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POSTWAR TRADE REVIEWS

**BRITISH WEST INDIES**  
**AND**  
**BRITISH GUIANA**

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**DEPARTMENT OF TRADE AND COMMERCE**  
**OTTAWA, CANADA**



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# BRITISH WEST INDIES

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## GEOGRAPHY, HISTORY AND POPULATION

In the tropical waters of the Caribbean sea, 10 to 20 degrees from the equator, is a series of small islands which comprise the British West Indies. For easy commercial reference there is usually included with them the Colony of British Guiana on the mainland of South America, and British Honduras located in Central America. Bermuda, much further to the north, though regarded as part of the British West Indies, is hardly in the same sphere of commercial interest.

Most of the islands are mountainous, land being cultivated on their lower slopes, in the valleys, and on the level stretches between the mountains and the sea.

The temperature is about 82 degrees Fahrenheit the year round, with a high humidity. Heavy tropical showers occur throughout the greater part of the year, although there is less precipitation from January to May. In British Guiana there is a further dry period during the months of September and October.

Travelling to the British West Indies should be done during the months of January, February and March, when the humidity is somewhat less intense and the temperature usually slightly lower than at other periods of the year.

### Commercial History

Sugar began to be produced systematically in the West Indies as early as 1650, and during the 17th and 18th centuries the Caribbean colonies had practically a monopoly of the sugar supply of the world.

Between 1623 and 1815, by settlement, conquest and treaty, Great Britain acquired the colonies which constitute the present British West

Indies and British Guiana. Slaves from South Africa, introduced into the West Indies as early as 1503, were used in increasing numbers on the estates until 1838, when slavery in the British West Indies was abolished.

During the next hundred years the British West Indies sugar producers experienced increasing competition from new sources of cane sugar supply in other parts of the world, and the production of beet sugar on the European continent. It culminated in a financial crisis in 1847, when there was a loss of sugar preferences in the United Kingdom and the average price of B.W.I. sugar dropped sharply.

As a measure of relief to the hard-pressed planters, whose former slaves were not always willing to work on the land, the importation of coolie labour from India was legalized for Jamaica, Trinidad and British Guiana in 1844. The flow continued until 1917, when it was terminated by the Indian Government. During this period 238,000 East Indians arrived in British Guiana and 145,000 in Trinidad. Jamaica received a comparatively small number of such labourers. The result has been that East Indians now form a large section of the population in both British Guiana and Trinidad.

Sugar conditions improved up to 1870, but from then bounty-fed beet sugar weighed heavily against the market prospects of British West Indian cane sugar. This situation encouraged the colonies to look to other tropical crops for cash returns. Jamaica planters developed the production of coffee, pimento, ginger, and later bananas. In Trinidad and Grenada they enlarged the cocoa plantations; St. Vincent planters cultivated arrowroot, and those in Dominica and Mont-



serrat went in for citrus fruits, especially limes.

From 1897 to 1903 there was a market for B.W.I. sugar in the United States, when a countervailing duty was in effect against European beet sugar. The market was lost in 1903, with abolition of bounties on sugar exports by the Brussels convention, which caused the United States countervailing duties to disappear, the admission into the United States of Puerto Rican sugar duty free, and the extension of preferential treatment by the United States to sugar imported from the Philippines and Cuba. British West Indian sugar producers then began to take full advantage of the market for sugar in Canada, where there was a British preference rate and a surtax on beet sugar from Germany.

### Population

Against this fluctuating commercial background the population of the British West Indies has grown to nearly 3 million inhabitants. An extremely high percentage are the descendants of liberated African slaves. In Trinidad and British Guiana there have also developed large East Indian communities, together with strong Chinese and Portuguese elements. In all the colonies Europeans form a comparatively small section of the population.

The distribution of population, according to area, is as follows:—

	Area Square miles	Population (1943 estimate)
Bermuda .....	19½	31,000
British Honduras ...	8,598	57,767
Western Group:		
Jamaica .....	4,864½	1,250,000
Bahamas .....	4,404	68,846
Eastern Group:		
Trinidad .....	1,980	522,168
Barbados .....	166½	200,674
Windward Islands:		
Grenada .....	120	87,805
St. Lucia .....	238	71,232
St. Vincent .....	150	60,403
Dominica .....	304	53,686
Leeward Islands:		
Antigua .....	170½	42,789
St. Kitts & Anguilla	152	38,305
Montserrat .....	32½	13,332
Virgin Islands ...	67	6,720
British Guiana .....	89,480	354,219
Total population.	....	2,858,945

### Government

The British Government is following the policy of giving greater local representation in the colonial governments, which for the most part control their own revenues and expenditures. Final authority is vested, however, in the governor of each colony, who works under the guidance of the Secretary of State for the Colonies in London. Matters of trade policy are decided in London, but local officials are allowed a certain margin of interpretation to meet local conditions.

The fact that the British West Indies are Crown colonies and must therefore reflect the trade policy of the British Government should be clearly realized at all times.

### Education and Income Range

Primary and secondary schools in the British West Indies operate partly under government grant and partly under church and other organized support. Standards are usually set by the government departments of education in each colony, but it is recognized that there is need for great improvement in the general education in the British West Indies. Consideration is now being given to the establishment of a British West Indies University.

In these over-populated islands agriculture provides most of the employment at rates of pay which are low according to North American standards. There has been some revision of wages upward during the war, and there is steady pressure for further increases, but no matter what changes this may bring, the British West Indies must continue to be regarded as a market for low-priced manufactured goods and essential foodstuffs.

### Economy

British West Indies economy is based on agriculture, of which the chief product is sugar with its by-products, molasses and rum. A wide range of agricultural products supplementary to sugar are also produced; for example,



bananas in Jamaica, cocoa in Grenada and Trinidad, rice in British Guiana, starch in St. Vincent, citrus products in Trinidad and the Windward Islands, and cotton in certain of the Windward and Leeward Islands.

Manufacturing is generally confined to processing of agricultural products.

There are two industries of international importance, namely, production and refining of petroleum in Trinidad, and the production of bauxite in British Guiana.

There are, of course, a considerable number of local industries designed for either island or inter-island trade, and in this connection Jamaica has been particularly active. For the most part these industries are of a nature which do not seriously conflict with exports from Canada.

### History of Trade with Canada

Canada's trade with the British West Indies has had a long and varied history. Before Confederation, schooners from the Maritime Provinces were sailing southward with lumber and foodstuffs, and returning with West Indian sugar, rum and molasses. The modern pattern of trade began to unfold early in the twentieth century when West Indian sugar, shut out of the United States market in 1903, began moving to Canada under a tariff preference which had been granted as early as 1898.

Subsequent Canada-British West Indies trade treaties in 1912, 1920 and 1925 were designed to promote reciprocal trade, and to-day trade is still being

carried on under the treaty of 1925 which has been extended until such time as it can be conveniently reviewed.

By 1938 the British West Indies provided a market for Canadian products to the value of \$14,000,000 or 6.2 per cent of Canada's domestic exports to countries other than the United States and the United Kingdom, and 72.7 per cent of Canada's exports to countries in the Caribbean area.

During the war years Canada became the main source of British West Indies foodstuffs, and also supplied a large percentage of the manufactured products, so that total exports from Canada in 1943 were valued at \$38,000,000 or 4.5 per cent of Canada's domestic exports to countries other than the United States and the United Kingdom, or 85.8 per cent of the exports to the Caribbean area.

The distribution of this trade in 1938 and 1943, according to main markets in the British West Indies, is shown in Table 1, values being in Canadian dollars.

Canada received from the British West Indies shipments of sugar, bauxite, molasses, rum, citrus products, bananas, and sundry other products which were valued (in round figures) at \$20,000,000 in 1938 and \$25,000,000 in 1943.

For trade purposes the British West Indies may be considered in two general sections—the Western, comprising Jamaica, the Bahamas and possibly British Honduras, and the Eastern section, which is known as the British West Indies (Eastern Group) and British Guiana.

TABLE 1  
*Distribution of Canadian Exports*

	1938		1943	
	Value \$Can.	Per cent of total trade	Value \$Can.	Per cent of total trade
Bermuda .....	1,413,846	10.0	2,010,808	5.2
British Honduras .....	279,563	1.9	226,702	.5
Jamaica .....	4,442,408	31.4	8,895,731	23.6
Barbados .....	1,077,350	7.6	2,955,309	7.78
Trinidad .....	3,714,336	26.3	13,706,279	36.0
Other B.W.I.* .....	1,777,553	12.6	4,365,206	11.2
British Guiana .....	1,397,862	9.9	5,740,141	15.1
Total .....	14,102,918		37,990,176	

\* Leeward Islands, Windward Islands and Bahamas.



## BRITISH WEST INDIES (EASTERN GROUP) AND BRITISH GUIANA

The British West Indies (Eastern Group) is comprised of the Leeward and Windward Islands, Barbados, and Trinidad, and to this group there is usually added British Guiana, although it is on the mainland of South America.

Barbados and British Guiana, situated north and south respectively of Trinidad, together provide a market second in importance to Trinidad in the Eastern Caribbean.

Together their populations total about 29.5 per cent of that of the British West Indies as compared with Trinidad's 18.2 per cent, but as markets they received only 17.5 per cent and 22.9 per cent of the total imports from Canada into the British West Indies in 1938 and 1943 respectively as compared with Trinidad's 26.3 per cent and 33 per cent.

### TRINIDAD

Trinidad is the most southern island of the British West Indies (Eastern Group), being about 10 degrees off the Equator and only a few miles from the Venezuelan coast of South America.

With its petroleum industry supplementing its cash crops of sugar, cocoa and citrus products, Trinidad is the

There are also some small sawmills, a paper pulp plant for the manufacture of pulp from bamboo, a match factory, four tanneries, two biscuit factories, a brewery, a bitters plant, and nine aerated water bottling plants.

Trinidad is also the traffic hub for air services operating between South



Sugar Cane Carts Loaded—Trinidad.

*Courtesy, Pereira & Co. Ltd.*

premier market of the group. In addition to the petroleum industry and sugar and rum manufacturing, there are a number of minor industries for the processing of grapefruit juice, lime juice and lime oil, and for the production of coconut oil, margarine, coconut meal, lard compound and soap from copra.

and North America and for a British West Indies service operating throughout the British West Indies as far as Jamaica.

### EXPORTS

Trinidad's exports in the pre-war year 1938 totalled \$35,000,000 in round figures. The United Kingdom received



49·7 per cent of the exports, Canada 8·1 per cent, and the United States 5·7 per cent.

The United Kingdom derives much of its importance as a market for Trinidad exports by reason of the fact that it receives a high percentage of the Colony's petroleum exports, which in 1938 were valued at \$23,000,000.

Sugar production, however, continues to give the most employment to the population and exports in 1938 totalled \$5,000,000 in value. Canada in that year received 37·4 per cent of the sugar exported and prior to that time averaged about 32·1 per cent per annum.

Cocoa, once the primary export of Trinidad, has fallen by the way on account of blight and adverse market conditions. Exports in 1938 were valued at \$2,300,000, with the United States providing the main market.

Other pre-war exports included grapefruit, grapefruit juice, molasses, bananas, bitters, raw coffee and coconuts. Lack of shipping space during the war years did not permit the export of such items as bananas and grapefruit, while home demand for copra has taken care of the coconuts.

When shipping space was available Canada provided a useful market for bananas and still is taking most of the Colony's production of grapefruit juice.

#### IMPORTS

Trinidad's imports have shown a steady rise in total value since 1932. In 1938, the last pre-war year, the value was approximately \$35,000,000, and in 1941, before adverse shipping conditions developed, it had risen to \$57,000,000.

Before the war the United Kingdom was consistently the main source of supply, providing 35 to 45 per cent of the imports. During the war the United Kingdom was superseded by both Canada and the United States.

Pre-war imports from Canada failed to show much improvement and in 1938 amounted to only 12·15 per cent of the total imports. Canadian exporters were experiencing strong competition from other Empire sources under the

British preferential rates for foodstuffs and Canadian manufacturers did not participate to any extent in the manufactured goods section of the trade. Under war conditions, however, Canada became the principal source for foodstuffs and did an increasing share of the business in manufactured goods, with the result that by 1941 Canada was supplying 31·43 per cent of the total imports.

Trinidad's need of specialized machinery and equipment for the oil-fields has provided a steady market for products from the United States. In 1938 the United States supplied 23·72 per cent of the total imports and 24·87 per cent in 1941. The percentage has been higher in recent war years.

#### IMPORTS BY MAIN CLASSIFICATIONS

In recent years the market for manufactured goods has been much larger than that for foodstuffs. Of the total imports valued at approximately \$35,000,000 in 1938, foodstuffs were valued at \$9,000,000, manufactured goods at \$24,000,000, and semi-manufactured goods at \$2,000,000.

In 1943 total imports were valued at \$59,000,000, foodstuffs at \$21,000,000, manufactured goods at \$32,000,000 and semi-manufactured goods at \$6,000,000.

*Foodstuffs.*—From 30 to 35 per cent of Trinidad's food imports such as rice, raw cocoa, edible oil and salt, are of a type which are not normally supplied from Canada. Of the remainder, Table 2 shows the value of imports in 1938 of the basic commodities which Canada is in a position to supply. Food imports from all sources in that year had a total value of \$(B.W.I.) 8,860,491.

During the war years Canada's position in the supply of many foodstuff items greatly improved. At present Canada supplies almost all the flour, a large share of the condensed milk, and a high percentage of the butter, beer and canned fish. For the latest information and full details as to food imports into Trinidad from Canada, it

TABLE 2

*Trinidad Imports in 1938 of Principal Foodstuffs from Canada*

	Total import value \$(BWI)	Proportion of total food imports %	Proportion from Canada %
Flour .....	1,779,536	20.0	59.7
Fish, cured and salted .....	433,078	4.8	72.0
Condensed milk .....	745,032	8.4	2.7
Pickled meats .....	254,201	2.8	20.0
Butter .....	340,408	3.8	.4
Meats, smoked or cured .....	229,034	2.6	.9
Beer .....	128,706	1.4	21.9
Oilseed cake and meal .....	93,479	1.0	2.5
Potatoes .....	160,917	1.8	79.4
Oats .....	96,974	1.9	81.1
Canned fish .....	133,209	1.5	65.7
Totals .....	4,394,574	50.0	

is recommended that application be made to the Department of Trade and Commerce for the latest report on the trade of Trinidad, which is prepared annually.

*Manufactured Goods.*—As has been stated, Canada was able to improve greatly her position in the supply of manufactured goods to the British West Indies, and to Trinidad in particular, during the war years. Under normal circumstances some of this trade will revert to pre-war channels. Table 3 indicates those general clas-

sifications of manufactured goods which Canadian manufactures have shown themselves capable of supplying.

As in the case of foodstuffs, full details in respect to specific items and most recent values of imports from Canada may be obtained by applying to the Department of Trade and Commerce for the latest report on the trade of Trinidad.

*Semi-manufactured Goods.*—Within this general classification is included imports of lumber from Canada, which

TABLE 3

*Trinidad Imports of Manufactured Goods in 1941*

	Value \$(BWI)	Proportion of total %	Value \$(BWI)	Imported from Canada Pro- portion of group value %	Change in proportion from 1938 %
Iron and steel manufactures .....	7,766,110	17.2	1,405,641	18.0	+17.3
Machinery .....	5,292,854	13.4	380,923	7.1	+ 6.5
Vehicles .....	2,828,849	7.1	761,585	26.5	- 9.9
Cotton yarns and manufactures .....	1,983,979	5.0	763,020	44.0	+43.3
Apparel .....	2,439,028	6.2	1,301,260	53.3	+40.0
Pottery, glass abrasives* .....	2,049,977	5.2	451,063	22.0	+16.3
Chemicals, drugs and colours .....	2,283,212	5.8	694,411	32.1	+21.7
Cutlery, hardware, implements .....	1,215,074	3.8	250,876	20.5	+17.8
Electrical goods and apparatus .....	957,658	2.4	258,856	27.0	+22.0
Silk and artificial silk manufactures .....	1,175,637	2.9	478,589	40.7	+39.9
Paper, cardboard, etc. ....	985,147	2.5	636,877	60.6	+41.7
Oils, fats and resins .....	5,373,063	10.3	142,620	2.6	-10.2
Other textile manufactures .....	618,558	1.5	71,983	11.6	
Non-ferrous metals and manufactures .....	545,778	1.3	216,881	39.7	+36.8
Woollen and worsted manufactures .....	674,482	1.7	55,297	8.2	+ 8.0
Rubber manufactures .....	309,582	.7	151,266	16.5	-19.8
Wood and timber manufactures .....	222,077	.5	176,047	79.2	-62.9
Leather and leather manufactures .....	177,517	.4	89,998	50.6	+44.7
Coke and manufactured fuel .....	68,188	.1	Nil		
Miscellaneous .....	2,356,616	5.9	770,872	32.6	+28.4
Total .....	39,323,086				

\* Mainly cement.



under normal conditions consists of Douglas fir and cedar from British Columbia and white pine from the

Maritimes. Competition is mainly with pitch pine from the southern United States.

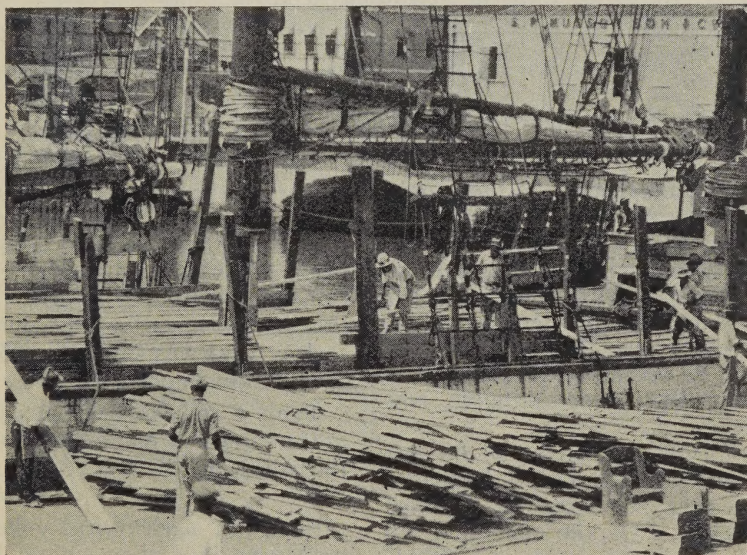
## BARBADOS

Some two hundred miles northeast of Trinidad (1 hour and 15 minutes by plane), Barbados has been under continuous British rule since 1625. This densely populated island of 200,674 inhabitants is dependent almost entirely on the production of sugar and its by-products, rum and molasses, for its cash income. The only important supplementary source of revenue is the tourist hotels which front its coral sand beaches.

### EXPORTS

Total domestic exports averaged £1,160,252 in value from 1925 to 1938. Sugar accounted for 57.1 per cent of the total value and molasses for 37.9 per cent. Rum, which had a comparatively modest pre-war export value, increased rapidly in volume and value during the war until in 1942 it was recorded at £68,382.

From 1921 to 1935 Canada received from 60 to 80 per cent of the Colony's



Schooner Unloading Canadian Lumber at Barbados.

The Colony has a number of small industries for domestic purposes, such as nine bakeries, two unsweetened-biscuit factories, two ice factories, and a factory each for soap, edible oil, cotton ginning and cigarettes. There are also bottlers of aerated waters, barrel and puncheon makers, a few furniture establishments and local printeries. These, together with the municipal gas, light and water plants, make up Barbados industrial activities.

exports. Since then exports to Canada, though substantial, have dropped on occasion to as low as 41 per cent. Canada is the main market for the Colony's fancy molasses and usually receives a good percentage of its sugar, although in the years just prior to the war a larger percentage of it was going to the United Kingdom. Nevertheless, with the exception of the year 1942, when shipping was difficult, Barbados has always enjoyed a very favourable balance in its trade with Canada.



## IMPORTS

The value of total imports into Barbados between 1921 and 1943 ranged from  $1\frac{1}{2}$  to  $2\frac{1}{2}$  million pounds sterling per annum. Up to the time of the war the United Kingdom was the principal source of supply, shipping about 40 to 45 per cent of total imports. Canada's trade during the pre-war years hovered around 14 per cent of the total imports, but during the war years rose to as high as 38.7 per cent in 1941. Pre-war imports from the United States amounted to about 11 per cent of the total imports and during the war did not show any marked improvement.

comprise the basic commodities in which Canada can compete.

During the war years Canada supplied the bulk of Barbados imports of flour and condensed milk, a good percentage of the butter, as well as increased supplies of other commodities.

*Manufactured Goods.*—About 50 per cent of the pre-war imports into Barbados consisted of manufactured goods. The United Kingdom supplied on the average about half of such imports, the United States 9 per cent, and Canada between 4 and 7 per cent. Pre-war there were also considerable imports of low-priced goods from Germany and Japan.

TABLE 4

*Barbados Imports According to Main Classifications*

	Average Value Total Imports £	Proportion of Total Imports		
		Food- stuffs %	Manufac- tured Goods %	Semi-manu- factured Goods %
1920-32 .....	2,470,000	38	42	20
1933-38 .....	1,830,000	37	54	9
1939-43 .....	2,390,000	36	49	15

Canada's participation in the supply of foodstuffs amounted to about 16 per cent of the total imports in 1938 and rose to as high as 50 per cent in 1942. Canada supplied only 6 per cent of the manufactured goods in 1938, but her share rose to 36 per cent in 1941, only to recede to 22 per cent in 1942 and 1943 when shipping was difficult.

*Foodstuffs.*—Approximately 30 per cent of the food imports into Barbados are of a type not normally supplied from Canada. Of the remaining 70 per cent, the items shown in Table 5

During the war, with supplies curtailed from the United Kingdom, European supplies stopped and imports from the United States restricted, Canada was able to improve her position in the manufactured goods trade and by 1941 was supplying 36 per cent of the total imports.

Table 6 indicates Canada's position in the supply of manufactured goods to Barbados in 1941 as compared with 1938.

Being an agricultural colony, it is to be expected that among Barbados

TABLE 5

*Barbados Imports in 1938 of Principal Foodstuffs from Canada*

	Value £	Proportion of	
		Total Imports %	from Canada %
Total foodstuffs .....	740,114	100	16
Flour .....	93,887	12.6	37.3
Fish, dried, smoked or salted .....	55,043	7.4	11.5
Salted pork .....	35,689	4.6	79.4
Oats .....	16,045	2.1	99.5
Oilcake and oil meal .....	38,272	5.1	17.5
Butter and substitutes .....	40,250	5.4	0.1
Fresh vegetables .....	21,450	2.9	41.8
Bran and pollards .....	8,982	1.2	2.0
Bacon and hams .....	15,509	2.1	1.0
Condensed milk .....	17,672	2.3	0.7
Cured fish .....	6,784	0.9	65.9
Cheese .....	4,057	0.5	87.6



principal manufactured imports will be found fertilizers and consumer items such as cotton textiles and wearing apparel. Oils, fats and resins are important because all the Colony's requirements in petrol, fuel oil and lubricating oil have to be imported.

Vehicles, which include motor vehicles, under normal conditions rank fifth in importance, closely followed by machinery consisting largely of sugar machinery. Ferrous metals, listed about seventh in importance, covers most of the metallic building materials such as galvanized roofing, nails, etc.

While motor vehicles were about the only outstanding manufactured import from Canada before the war, during the war years there were very notable increases from Canada in fertilizers, wearing apparel, motor vehicles, paper products, ferrous metals and manufactures, and art silk products.

*Semi-Manufactured Goods.*—The principal imports from Canada under this classification consist of lumber (Douglas fir, white pine and spruce), shingles, staves and headings for molasses puncheons. There is a steady demand for all these items.

TABLE 6  
*Barbados Imports of Manufactured Goods in 1941*

	Value £'000	Pro- portion of Total %	Received from Canada		
			Value- £'000	Pro- portion of Group %	Increase or decrease from 1938 %
Total .....	1,133	100	416	36	+30
Chemicals, colours and fertilizers....	220	19.4	128	58.1	+51
Cotton piece-goods and manufactures.	96	8.4	10	10.4	+ 9
Oils, fats and resins .....	88	7.7	5	5.6	+ 5.5
Apparel .....	110	9.7	5.3	48.1	+39.3
Vehicles .....	46	4.0	24	52.3	+33.4
Machinery .....	53	4.6	8	15.0	+13.3
Ferrous metals and manufactures....	40	3.5	22	55	+31.1
Cutlery, hardware and implements..	33	3.0	12	36.3	+28.1
Paper and paper products .....	42	3.7	28	66.4	+56.5
Electrical goods and apparatus.....	15	1.3	0.025	0.1	— 2.9
Soap and perfumery .....	34	3.0	12	36.3	+28.1
Other textile manufactures .....	53	4.6	4	7.5	+ 3.1
Silk and artificial silk manufactures.	31	2.7	17	54.8	+54.7
Pottery, glass, clay products, cement:	35	3	8	22.8	+14.7
Wool and wool manufactures.....	30	2.7	1	3.3	+ 3
Wood and wood manufactures.....	15	1.3	0.025	0.1	— 2.9
Rubber and rubber manufactures....	35	3.1	14	40	+ 5.3
Leather and leather manufactures....	8	0.7	2	8.7	+ 4.8
Non-ferrous metal and manufactures..	5	0.4	0.091	1.8	+ 1.2
Miscellaneous .....	52	4.5	18	34.6	+27.5

## BRITISH GUIANA

Although British Guiana is on the mainland of South America, about 358 miles southeast of Trinidad, it is usually associated with the British West Indies Eastern Group as one of the area's three main markets.

Most of the Colony's inhabitants rely on the cultivation of sugar cane and rice for their livelihood. These are grown on a narrow coastal strip which for the most part is close to or below sea-level.

From the Colony's interior is drawn bauxite, gold and diamonds. During

the war bauxite gained pre-eminence as the Colony's most valuable export. Lumber is also milled from the Colony's rain forests, the principal product being a very hard tropical wood, greenheart, which is exceptionally well suited for marine timbering.

## EXPORTS

Between the years 1930 and 1938 the Colony's exports varied in value from \$8,800,000 to \$13,000,000 (BWI). During the war exports rose steadily until in 1943 they were listed at \$23,100,000.



Before the war sugar and its by-products averaged about 66·6 per cent of the value of the total exports, but with wartime rise of the bauxite trade the proportion dropped to as low as 37 per cent of the export trade in 1943.

Exports of bauxite rose in value from \$260,000 in 1933 to \$10,800,000 in 1943, at which time they represented 47 per cent of the total exports.

Colony's total exports, and the United Kingdom an average of 40·3 per cent.

Canada's position as a market for the Colony's products was of course greatly strengthened by the increasing shipments of bauxite, which were made to the Canadian firm controlling its mining in British Guiana. Nevertheless, except for the years 1932 to 1943 inclusive, there was shipped to Canada



Sugar Cane Punts and Handling Equipment in British Guiana.

Exports of gold and diamonds have remained fairly steady at around \$1,000,000 to \$1,500,000 in value, or about 11·6 per cent of the pre-war trade. During the war the percentage dropped, reaching as low as 3 per cent in 1943.

Pre-war exports of rice ranged in value from \$500,000 to \$1,000,000 and formed about 8 per cent of the total pre-war domestic exports. Under favourable market conditions in the Caribbean during the war, exports tended to expand.

Forest products were exported before the war to a value of about \$500,000 to \$1,000,000, or roughly 5 per cent of total exports.

between 1928 and 1938 an average of 67 per cent of the sugar exports. During the war, with sugar under the control of the British Ministry of Food, exports to Canada tended to decline.

In addition to sugar Canada received about 30 to 60 per cent of the Colony's pre-war molasses exports, but these also fell away during the war. Rum shipments, however, increased during the war, so that by 1942 Canada was receiving about 26 per cent of the Colony's overproof rum.

As a result of this strong movement of trade to Canada, British Guiana has consistently enjoyed a favourable balance of trade with Canada, with the exception of the year 1943.

#### DIRECTION OF EXPORT TRADE

Between 1930 and 1943 Canada received an average of 43 per cent of the

#### IMPORTS

British Guiana's pre-war imports ran at \$7 million to \$11 million per annum,



and in 1943, after a steady rise during the war years, stood at \$24 million.

The United Kingdom supplied from 50 to 60 per cent of the total imports before the war, but its share dropped to as low as 17 per cent in 1943. Imports from Canada pre-war amounted to only 12 to 14 per cent of the total imports, but mounted rapidly during the war years till in 1943 Canada was supplying 37 per cent.

Imports from the United States before the war were also low, amounting only to 11 per cent of the total in 1938. During the war they tended to rise and stood at 27 per cent in 1943.

#### IMPORTS BY MAIN CLASSIFICATIONS

British Guiana's imports may be divided roughly as follows: foodstuffs, 30 per cent; manufactured goods, 65 per cent; semi-manufactured goods, such as lumber, oil and asphalt, 5 per cent.

Before the war Canada supplied 26 to 28 per cent of the foodstuffs, but only 7 to 9 per cent of the manufactured goods. In the semi-manufactured goods section, which was small, Canada supplied about 17 to 21 per cent.

During the war Canada's share in the imports of both foodstuffs and manufactured goods greatly increased.

By 1943 Canada was supplying 65 per cent of the former and 28 per cent of the latter.

*Foodstuffs.*—Table 7 shows 1943 imports of the principal foodstuffs which Canada was able to supply in 1943 as compared with 1938.

*Manufactured Goods.*—Canada supplied 6 to 9 per cent of the pre-war imports of manufactured goods. The intense trade diversion to Canada during the war years greatly changed the situation for Canadian manufacturers who are now actively engaged in shipping to British Guiana and other British West Indian markets. This change, which raised imports of manufactured goods from Canada up to as high as 32 per cent of the total manufactured goods trade in 1941 (it has receded to a somewhat lower level since), is indicated in Table 8 which shows imports in 1943 of manufactured goods in the supply of which Canada participated and changes in Canadian supply as compared with 1938.

It will be noted that the value of imports of motor vehicles in 1943 (shown in Table 8) was abnormally low on account of war restrictions. In 1938 the importation of motor cars, vans, etc., was valued at \$157,727.

*Raw and Semi-manufactured Materials.*—Lumber is the only important

TABLE 7

*Imports in 1943 of Principal Foodstuffs Available from Canada*

	Total value \$(BWI)	Pro- portion of total imports %	Received from Canada Pro- portion of group value %	Increase or decrease from 1938 %
Total .....	6,892,042	100	65	+37
Flour .....	1,774,589	26.0	100	+53
Fish, smoked and dried .....	214,964	3.0	90	+13
Fish, canned .....	187,880	2.7	98	+20
Fish, pickled .....	70,026	1.0	100	....
Butter .....	433,171	6.2	31	+31
Cheese .....	48,132	0.7	33	+ 3
Condensed milk .....	597,619	8.5	100	+99
Meats, pickled .....	617,470	8.8	28	+ 7
Meats, other kinds .....	66,204	0.9	....	....
Beer .....	266,520	3.8	38	+33
Potatoes .....	172,099	2.4	91	+30
Vegetables, n.o.p. ....	132,129	1.8	19	- 3
Peas, beans and lentils.....	392,489	5.4	78	+78
Tobacco—				
Manufactured .....	71,926	1.0	....	....
Leaf .....	230,644	3.2	1.9	+ 6
Cigars and cigarettes .....	25,285	0.3	5	+ 5
Tea .....	64,173	0.9	....	....
Oats .....	57,373	0.8	100	+25



TABLE 8

*British Guiana Imports of Manufactured Goods in 1943*

	Total value \$(BWI)	Pro- portion of total imports %	Received from Canada Pro- portion of group value %	Increase or decrease from 1938 %
Total .....	16,265,175	100		
Machinery .....	1,946,554	11.8	26	+23
Apparel .....	1,132,667	6.9	46	+37
Cotton piece-goods .....	2,698,060	16.5	31	+31
Other cotton manufactures .....	381,050	2.3	4	+ 3
Metal manufactures .....	885,038	5.4	26	+10
Manufactured fertilizers .....	185,991	1.1	61	+61
Mineral oils .....	817,827	5.0	1	- 2
Paper manufactures .....	632,431	3.8	61	+43
Empty bags and sacks .....	1,204,471	6.1	14	+14
Art silk manufactures .....	663,480	4.0	18	+18
Medicines and drugs .....	492,415	3.0	29	+13
Motor cars, lorries and vans .....	22,675	0.1	59	+15
Electrical goods and apparatus .....	183,648	1.1	37	+32
Common soap .....	370,386	2.2	49	+49
Woollen manufactures .....	176,817	1.0	1	+ 1
Paints and colours .....	249,989	1.5	45	+34
Cement .....	211,402	1.1	84	+69
Implements and tools .....	134,148	0.8	13	+10
Chemicals, other than salt .....	316,531	1.8	30	+26
Cordage and twine .....	357,156	2.1	37	+33
Hardware .....	53,022	0.3	32	+26
Perfumery .....	81,247	0.4	15	+ 8
Glass and glassware .....	196,135	1.2	10	+ 5
Rubber tires and tubes .....	38,213	0.2	18	-10

product in this classification imported from Canada. From 1918 to the beginning of the war Canada supplied 60 to 70 per cent of the Colony's total lumber imports, the remainder being imported from the United States. During the war lumber imports were restricted in order to encourage the use of locally milled woods.

### Other Eastern Group Markets

The remaining markets in the Eastern Group of the British West Indies,

namely, the Leeward Islands of Antigua, St. Kitts and Montserrat, and the Windward Islands of Grenada, St. Vincent, St. Lucia and Dominica, received about 10 per cent of Canada's exports to the Eastern Group and British Guiana. The imports into these markets are very similar in type and relative importance to those of the three main markets of Trinidad, Barbados and British Guiana; hence the requirements of these smaller markets are not dealt with in this report.

## MISCELLANEOUS INFORMATION

The Department of Trade and Commerce, through its foreign trade officers, is able to provide detailed and up-to-date advice on market prospects for any item of interest and to suggest reliable agents where needed; also to supply information on shipping services, tariffs, local restrictions, and any other points incidental to entering these markets. In the following paragraphs, therefore, merely brief statements are made on some points of general importance.

### AGENTS

Sales are usually made through resident commission agents. It is always advisable for exporters to check either with the Department or their banker before negotiating with any unknown agent. For advice and assistance, interested exporters should write to the Canadian Government Trade Commissioner, P.O. Box 125, Port of Spain, Trinidad.



## COMMUNICATION SERVICES

Airmail, surface mail, and telegraph services are available for each colony. Telephonic communication between Trinidad and North America is expected to be in commercial use soon.

Travel to the British West Indies for business purposes is usually by Pan-American Airways from Miami. It takes a day to get to Trinidad.

There is inter-island air service to most of the colonies by British West Indies Airways operating out of Trinidad.

Limited accommodation by boat is now becoming available on the Canadian National Steamships and Alcoa Steamship Service—the two lines which carry the bulk of the Canadian cargoes to the British West Indies. Both have offices in Montreal and Toronto.

## CUSTOMS TARIFF

Each colony has its own tariff, but all carry British preferential rates for Canadian goods. The preference margin on most goods is  $33\frac{1}{3}$  per cent in the Leeward and Windward Islands and 50 per cent in the tariffs of Trinidad, Barbados and British Guiana. Preferential rates are extended to those products which have a British Empire content of 25 per cent or 50 per cent, according to product.

## IMPORT RESTRICTIONS

Under the existing restriction of imports for currency reasons, imports from Canada are limited at present to essential items in minimum essential quantities. Consequently an importer must secure import licences from the import authority in each colony before he can officially place an order. Goods cannot be cleared through customs without the production of a valid import licence.

It is extremely important therefore that Canadian exporters have a copy of the valid import licence before shipping any goods ordered. Care should also be taken to have the goods shipped *before* the expiry date indicated on the import licence.

## CURRENCY, WEIGHTS AND MEASURES

The currency in use throughout the Eastern Group is the British West Indian dollar, which is tied to the pound sterling at a value of 4s. 2d. or \$4.80 to the pound. The British West Indian dollar is at an approximate 10 per cent discount in terms of the Canadian dollar.

English weights and measures are the official standards.

## QUOTATIONS AND TERMS

It is preferable to quote c.i.f. port of destination, and at least f.a.s. seaboard. Quotations f.o.b. are, of course, acceptable for parcel post, but the postal rate should be indicated. Quotations should be in Canadian dollars or sterling. Quotations in United States dollars are not accepted by the import control authorities.

Customary terms are sight draft D.O.A. to recognized customers of good standing. Letter of credit is advisable for doubtful customers or where any conditions are uncertain.

## DOCUMENTATION

Commercial invoice, two copies of approved customs invoices with certificate of origin carefully completed, plus the usual bill of lading are usually required. Importers expect shipments to be covered by insurance.

In view of the variation in tariffs in the individual colonies it is advisable to itemize separately freight, insurance, and handling and incidental charges.

For customer's convenience, each case of merchandise should be separately marked and this marking indicated on the invoice with itemized statement of contents under each marking.

## PACKING

Exporters should not skimp on packing. They will avoid claims by good packing. It is advisable to use sturdy wooden crates or plywood cases capable of withstanding rough handling or efforts at pilfering.

Foodstuffs, such as potatoes, should be given adequate ventilation to avoid sweating.



## JAMAICA

### RESOURCES AND DEVELOPMENT

Jamaica was discovered by Columbus on his second voyage to the Western Hemisphere in 1494. It remained in the possession of the Spaniards for 160 years and among the important events during their occupation was the almost complete extermination of the aboriginal Arawak Indians, whose name "Xaymaca" for the Island, has remained. It was the Spaniards who first brought black slaves from Africa.

To-day, after nearly 300 years of British tenure, Jamaica is the largest and in many respects the most important island in the British West Indies. Among the outstanding historical incidents of this period may be cited: the great earthquake in 1692, which destroyed and partially submerged old Port Royal and led to the settlement of Kingston; the abortive invasion by French troops in 1694, thwarted by Jamaica militia; Lord Nelson's term as Governor of Port Royal in 1779; Captain Bligh's arrival in 1793, introducing the breadfruit tree; total abolition of slavery, August 1, 1838; the famous Morant Bay rebellion in 1865; introduction of the mongoose direct from India in 1872, originally intended to eliminate the rat pest, and which has also eradicated snake life and harmfully affected bird and other wild life; the disastrous Kingston earthquake in 1907 which, combined with fire, utterly destroyed the city; and finally, though not singular, the hurricane of August, 1944, which destroyed 40 per cent of the coconut trees and took a heavy toll of other agricultural crops.

#### Geography and Climate

Jamaica lies about 90 miles south of the eastern end of Cuba, in the Caribbean Sea, and roughly 600 miles due north of the Panama Canal. By ship, it is 1,800 miles from Halifax, and, of particular note, it is 1,100 miles from Trinidad, the most southerly island in the Eastern Group of the British West

Indies. The island extends 144 miles east and west, and is 49 miles across at its widest part. Approximately 90 per cent of its area is mountainous, with the famous Blue Mountain Peak rising to about 7,400 feet in the eastern part.

As the Indian name implies, Jamaica is "the land of wood and water", although with few exceptions its many rivers are rushing torrents and unnavigable. There is, as a result, a diversity of climatic conditions, with temperatures ranging from 80° to 90° F. at sea-level (Kingston) to 50° in the high altitudes, while the mean island humidity is 78 per cent. The average rainfall for the whole island is 76 inches, although this has an extremely variable range from 35 to 200 inches between regions. In general, the rainy months are May to November, with a break during July and August, while December to April is dry. Prevailing winds are northeast in the mornings and southeast in the afternoons. Hurricane months are July, especially August, and September, and over the past 200 years Jamaica has been visited by a destructive storm on an average of once every 12 years.

The Colony with its dependencies (consisting of the Turks and Caicos Islands to the northeast of Cuba, and the Cayman Islands and Morant and Pedro Cays to the west and south respectively) comprises slightly more than one-third of the area and contains nearly one-half of the population of the British West Indies. According to the last census in 1943, the population of Jamaica was 1,237,063, with an estimated annual increase of 20,000. The total population is broken down as follows: black, 965,960; coloured, 216,348; East Indian, 26,504; Chinese, 12,394; British, white, including 244 Canadians, 10,189 (or about 0.8 per cent); and all others, 5,668. Kingston is by far the largest centre with 202,208 persons. Other cities are: Spanish



Town, 12,028; Montego Bay, 11,500; May Pen, 6,038, and Port Antonio, 5,482.

### Illiteracy and Incomes

According to the 1943 Census 25·6 per cent of the population seven years of age and over (1,018,955) was illiterate, while the literacy qualification was merely a statement of ability to read and write. At the same time statistics established income groups of 95 per cent of employed wage-earners as follows: under 6s. per week, 28·2 per cent of total wage-earners; from 6s.

living index stood at 159·5 compared with 100 pre-war and the Government undertook to stabilize it at 160 or below. This was done (and the policy continues) by fixing ceiling prices and subsidizing some of the more important commodities comprising the consumption of the labouring classes.

### New Constitution

Insistent demands over a period of years that Jamaicans should assume a greater share in the responsibility of government resulted in the Colonial



Post Office, Kingston, Jamaica

*Courtesy B. Matthews*

to 10s., 23·9 per cent; from 10s. to 20s., 25·7 per cent; from 20s. to 40s., 12·4 per cent; from 40s. to 60s., 4·7 per cent. These figures strikingly indicate the low purchasing power among the masses.

During the war all imports and exports have been controlled by government permit issued by the Competent Authority, who also fixes wholesale and retail prices of many foodstuffs and materials used domestically. At November, 1942, the cost-of-

Office drawing up early in 1944 a new constitution, which was a unique document in colonial administration and is on trial for a period of five years. Among other features introduced was universal adult suffrage and provision for an increase from 14 to 32 in the number of elected members to the new House of Representatives. Previously the Government had consisted of the Governor, a Privy Council and a Legislative Council. Briefly the new constitution provides for the following:—

*Executive Council.*—Governor; 5 elected members; 2 Government-nominated members; 3 Government ex-officio members, consisting of the Colonial Secretary, the Financial Secretary and Treasurer, and the Attorney General.

*Legislative Council.*—10 Government-nominated members; 3 Government ex-officio members (as above); 2 other Government officials nominated by Government.

*House of Representatives.*—32 elected members.

The results of the first elections on December 14, 1944, under the new constitution for membership of the House of Representatives for an electoral period of five years, were: Labour, 22 seats; People's National Party, 5 seats; and Independent, 5 seats. The members of this House choose from among themselves the five elected members of the Executive Council.

Usual parliamentary procedure is for bills, including all matters of finance, to be introduced in the Executive Council. Decisions are then referred to the House of Representatives, and, if approved, are sent to the Legislative Council. If approved by that body, bills become law subject to ratification by the British Government.

His Excellency, the Governor, has no prime vote on the Executive Council, but has a casting vote, which, in view of the desire of the Colonial Office to interfere as little as possible in the government of the Colony, he is not likely to use, except in matters of paramount importance. In special cases affecting the safety or well-being of the island, the Governor has power to bring in a bill and declare it law without its being passed by a majority in the local legislature, but this prerogative is only to be invoked in cases of dire emergency and with the approval of the Secretary of State.

### **Colonial Development and Welfare Schemes**

In an endeavour to improve general conditions in the island and to assist in placing economy on a sounder basis,

the British Government approved a number of grants and loans under the Colonial Development and Welfare Scheme. Up to January 31, 1945, an amount of £3,775,040 had been approved covering 95 schemes, of which 32 were small grants not exceeding £500, while four of the total number of major schemes have been completed and two deferred. Of the above sum, £3,021,440 is by grant and £753,660 by loan. These schemes also involve the Colony in £696,735 expenditure from revenues. Expenditure to the end of March 31, 1945, amounted to £1,573,282 and was allocated as follows: agriculture, £701,336; public health, £514,295; communications, £156,360; social welfare, £77,262; education, £33,682; and miscellaneous, £90,347.

In addition to these schemes, the British Government made available to banana planters who suffered serious losses by the hurricane in August, 1944, the sum of £650,000, of which £200,000 represented free grants for crops destroyed, £200,000 in loans at 2½ per cent for rehabilitation, and £250,000 at the same interest rates to bring new areas into cultivation.

Within recent months the Government formed a committee of the Executive Council to draw up a ten-year plan for the improvement and development of the island.

### **Agriculture**

Jamaica is primarily an agricultural country, having a great variety of tropical products. In spite of its mountainous nature, alluvial soil extends right to the peaks, permitting cultivation on all but the precipitous slopes. However, the Report of the Agricultural Policy Committee of Jamaica, 1945, states, "Whilst at the moment a great deal of the land in Jamaica is unused, and much is inefficiently used, it is a fact that the total available land is inadequate to the needs of the present population, under existing methods of use . . . There has been and still is grave misuse, abuse and waste of land . . . The slopes have been denuded of vegetation and exposed to constant alternations of severe



drought and heavy rainfall. Consequently, large areas have been subject to extensive erosion for generations. Soil fertility has been allowed to run down to dangerously low levels, and economic yields cannot be obtained until the basic soil deficiencies have been made good . . . Agriculture suffers from a crippling lack of essential capital equipment. This applies as much to the land itself, as it does to works of development: such as, soil conservation, water supply, dwellings, farm buildings, and to the collateral requirements of live stock, machinery and equipment, processing and storage plants and the like . . . Examination of available data establishes beyond doubt that costs of agricultural production are excessive, and that the output from the land is at a very low and inefficient level . . . Stability cannot be achieved without the widespread introduction of mixed farming. The nutritional standards of the mass of the people are inadequate, at present, for sustained physical effort in cultivation. To complete the vicious circle, malnutrition also undermines mental effort, and so contributes to the difficulties of education."

#### BANANAS

Inaugural shipments of bananas to North America began about 1870 when a small schooner landed its cargo at New York and Boston. In 1937 exports amounted to 27,000,000 stems. Since then diseases have cut down production, the 1944 hurricane added its toll of destruction, and lack of shipping during the war limited exports to very low proportions, with the result that shipments amounted to only 1,117,015 stems during 1944. It is expected that exports to Great Britain will be resumed shortly. Production is again increasing and, it is estimated, will amount to six million or more stems during 1946.

#### COCONUTS

Coconut trees grow almost anywhere in Jamaica but thrive best below 1,000 feet elevation. If it had not been for

the 1944 hurricane, commercial production in 1945 would have exceeded one hundred million nuts instead of an estimated sixty-four million and ninety million in 1946. The hurricane destroyed 40 per cent of the trees. Considerable replanting has been done, but it takes about eight years to bring the trees into production (as opposed to bananas which bear in something less than fifteen months).

#### CITRUS

Until about thirty years ago grapefruit were gathered only from trees growing wild, but with the fruit's added popularity abroad a modern industry has gradually developed. Oranges also grow readily and, as in the case of grapefruit, there are now many well-established groves of standard seedless varieties. Limes are not a large item among exports but are an important crop for lime-juice and oil.

#### SUGAR

The story of sugar is linked with that of bananas. Until about the end of the nineteenth century, sugar was the principal industry, but since then much land formerly in sugar has been planted in bananas. Since 1912 the banana industry has had a continual struggle against Panama disease and, more recently, leaf spot disease, with the result that considerable banana cultivation reverted to sugar. However, the International Sugar Agreement placed limitations upon sugar production (modified by temporary suspension during the war), while banana growing has been forced farther into the interior disease-uninfected areas where, at the same time, the control of leaf spot by spraying is rendered difficult by the hilly nature of the ground and absence of water.

Rum, of course, is directly allied to sugar, and for over one hundred years the reported export to England of 56,000 puncheons in 1806 remains a record. The previous year had also been a peak year in sugar production at 120,000 tons, only surpassed in very

recent times. The 1944-45 sugar crop is placed at 152,216 tons and 18,000 puncheons of rum (of approximately 110 imperial gallons), and the 1945-46 estimate places the sugar crop at 155,000 tons and 18,500 puncheons of rum. The present annual domestic consumption of these two products is, respectively, about 32,000 tons and 5,000

more than 2,000 barrels, but the 1945-46 crop estimate is only 1,200 barrels (of 200 pounds net). During the war the total exportable crop was sent to Great Britain.

Coffees grown below the 2,000 feet levels are of various types and qualities and are grown in many districts. Of the 1944-45 crop, 24,000 bags (of 200



Frome Central Factory, West Indies Sugar Company Limited, Jamaica

puncheons. The figure for sugar has considerably increased in recent years, due to the development of local manufacturing industries producing jams, jellies, and confectionery, and also to the shortage of imported and locally produced foods; the peasantry and, generally, the poorer classes, have been supplementing their diet with "wet" sugar, a somewhat crude but nourishing article.

#### COFFEE

The Blue Mountain coffee of Jamaica, grown at altitudes above 2,000 and up to 4,000 feet, is probably the best and highest-priced coffee in the world. In its heyday total production of Blue Mountain coffee was never

pounds) of exportable quality was all sent to Britain and constituted about 90 per cent of the total production of these other types.

#### PIMENTO

This crop, indigenous to Jamaica, is also known as allspice. It is an important item in the economy of the country. The 1945 crop is estimated at 2,200 tons or approximately 1,000 tons more than that of 1944.

#### OTHER CROPS

Other products are: cocoa, with an estimated crop of 2,200 tons, all sold to Canada; honey, reduced to an estimated 500 tons in 1945 as com-



pared with 900 tons in 1944 due to the hurricane damage to blossoming trees; ginger, of which Jamaica is the habitat for the finest quality; cassava, the universal food plant of the tropics; tobacco; logwood, a tree introduced into Jamaica from Honduras in 1715 which is used in medicine as an astringent besides its principal use as a dye.

### Industry

Industry in Jamaica is chiefly concerned with the manufacture and processing of agricultural and domestic products, but there are a few others worthy of mention.

#### APPAREL

In the last few years shirt-making has been an important industry in Jamaica and, together with the production of allied lines, has expanded as the result of wartime controls. Men's and boys' shirts, of ordinary and sports types, and men's, women's and children's knitted underwear of cotton and rayon are now being manufactured in fair volume. Men's ready-made suits, mainly of cotton but including those of tropical worsted and rayon textiles, are also turned out in appreciable quantities.

#### BEER

A local brewery, established about twenty years ago, supplies the bulk of the Island's consumption, although some shipments under quota have been received from Canada and it is expected pre-war business with the United Kingdom may again soon revive.

#### BISCUITS

Under tariff protection a local factory now supplies practically the whole of Jamaica's requirements of unsweetened biscuits and during the last few years the manufacture of sweet biscuits has also been undertaken.

#### BOX SHOOKS

During the war local woods were utilized for the manufacture of boxes

for the packaging of lard, margarine and biscuits (but not citrus). However, it is not thought that this industry can compete in normal times, since the wood is brittle, cracks easily and is of poor quality for the purpose.

#### CIGARS AND CIGARETTES

There are three factories making cigars, two of which are engaged almost entirely in export trade. The other factory also manufactures cigarettes, which now supply the bulk of the local demand. During the war the requirements of imported leaf tobacco came entirely from Canada.

#### COCONUT PRODUCTS

This is an expanding industry, which has received considerable financial support from the Government. The principal products are margarine, lard compound, edible coconut oil, laundry and toilet soaps, and poultry and stock feed. The raw material is the meat of the coconut, domestic production of which is large. Two factories of considerable size are in operation.

Production of edible oils, lard and margarine has increased to the point where imports are of negligible proportions, and up to August, 1944, considerable quantities of butter substitutes, lard and lard substitutes, coconut meal for animal food and coconut oil were being exported to other British West Indian colonies. Because of the shortage of nuts due to destruction by the hurricane, imports of edible fats and grease have since increased substantially in volume. The former is used in the production of soap. The import of common laundry soap is prohibited.

#### CONDENSED MILK

A local condensary began operations in May, 1940, and now produces at least 60 per cent of the island's consumption of sweetened condensed milk.

#### CONFECTIONERY

Wartime restrictions greatly decreased the volume of imported

confectionery, import licences being confined to bars of plain and milk chocolate. This encouraged local production of chocolates and sweets and appreciably increased the imports of glucose, flavouring extracts, containers, etc.

#### CORDAGE

The manufacture of rope and cordage has been an established industry for many years, native sisal being used for the purpose, but production is not sufficient to take care of the normal domestic requirements of rope, especially that used for marine purposes.

#### COSMETICS AND TOILET PREPARATIONS

A new industry, which sprang up during the war, is the manufacture of cosmetics, perfumes and other toilet preparations such as cold creams, vanishing cream, lip-stick, brilliantine, polishes and dressings. No special protection is afforded this industry and raw materials and containers are almost wholly imported.

#### WOODEN FURNITURE

This industry, which has operated in a small way for many years, has received considerable impetus as a result of the wartime restrictions on imports of all kinds of wood and metal furniture. Jamaica has fair quantities of native hardwoods, such as mahogany, mahoe, etc., suitable for cabinet work, and some first-class furniture of good design is being made. With a view to encouraging the industry, import permits were granted freely for upholstering materials, including tapestry and other coverings, locks, springs, tacks, etc., as well as mirrors for dressing-tables, drawer pulls, etc.

#### IRON AND STEEL FOUNDERING

A moderate-sized iron and steel foundry has been operating for many years, producing various kinds of castings and simple machine parts and also doing repair work. This business expanded considerably during the war in conjunction with the development of shipbuilding and repair. There are also a few smaller foundries in operation.

#### JAMS, JELLIES AND PRESERVED FRUITS

In respect of the production of these items, Jamaica has always been referred to as "a land of samples." On several occasions in the past, small packers of these products have submitted samples to Canadian and other importers and have received orders that would have kept a plant operating to capacity for several years. This condition is changing, and it may be that Jamaica will become a considerable producer of jams and jellies made from native fruits such as oranges, grapefruit, mangoes and guavas, as well as citrus peel, citrus pulp, etc. In recent years one fairly large and a few small plants for canning grapefruit and tomato products have been established. There are indications that these and similar industries will expand shortly.

#### LEATHER

Leather, especially sole leather, has been tanned in Jamaica for generations. In recent years a moderate-sized manufacturing industry has developed, and there is now a factory making upper leather (also boots and shoes by machinery). The trade is well established and has been stimulated by the expansion of shoe manufacturing, which, however, cannot supply more than a relatively small portion of the demand for leather footwear.

For some time most of the sole leather used in the island (sides of good grade) has been tanned locally, and the domestic output of upper leather—mainly the complete uppers and kid and box sides of various grades and colours, also small quantities of goat-skin basil—has moderately increased. But expansion of the industry is retarded because the supply of hides and skins in the Colony is much too small to yield all the leather needed. There is a limited production of harness leather from cowhide. The cheaper types of leather are tanned with mangrove bark and divi-divi pods, both grown in Jamaica, but chrome salts and other imported materials are used for the better grades.



## LUMBER

Early in the war the Government, through its marketing department, launched a scheme for the purchase and curing of locally cut lumber, consisting chiefly of tropical hardwoods and cedar. Several privately owned sawmills and one government-owned mill are now in operation, and upwards of one million board feet are produced annually. The lumber is used principally in cabinet making, but considerable quantities are now going into building, as a result of a shortage of imported supplies. Native lumber has the advantage of being termite-proof, or at least termite-resistant, but costs somewhat more than the imported product.

## MATCHES

The manufacture of matches is a monopoly of a local factory in the outskirts of Kingston. Match sticks are produced from native wood, but other raw materials are imported.

## STRAW MANUFACTURES

This is still what may be described as a "cottage industry." There are no factories, but the production of handbags, purses, hats, belts, etc., is increasing and small quantities have been exported.

## SUGAR

Among the sugar factories, one produces sufficient refined sugar to meet domestic requirements, and its importation is prohibited.

## OTHERS

Other industries include a dye factory, ice plants, the production of cassava starch, lime and bricks and tile, aerated waters and soft drinks. It is reported that a cement plant will soon be established and that there are prospects for a textile mill producing cotton and rayon yard goods, looking to the whole Caribbean area as a market outlet. A franchised company supplies light and power and operates the Kingston and St. Andrew street car service. A new power site with a capacity of 5,000 h.p. was recently brought into operation at White River on the northern coast. Electric current in the Kingston area is 110 and 200 volts A.C., 40-cycle.

## Railways and Roads

There are 216 miles of main-line railway in Jamaica. One line runs from Kingston to Spanish Town and thence north to Bog Walk and east to Port Antonio; another runs from Spanish Town west to May Pen and northwest to Montego Bay. There is also a spur running north from May Pen to Frankfield in the centre of the island, and another line from May Pen south to the United States base at Fort Simonds.

Of the 5,500 miles of highway and roads criss-crossing the island, 527 miles are macadamized and 2,000 miles gravelled. Of the remainder about 1,725 miles are termed driving roads and an additional 1,250 miles are cart paths.

## FOREIGN TRADE

Jamaica's greatest trade year was 1920, when total imports were valued at £10,313,282 and domestic exports amounted to £7,022,195. The nearest subsequent approach to these totals was in 1944, when imports were valued at £8,973,122 and domestic exports at £4,342,039. Over the years, re-exports increase the total value of exports by roughly 3 to 5 per cent.

Table 1 shows the value and volume of exports and imports for 1938, 1939,

1943 and 1944, thus providing comparative figures for pre-war and war-time conditions.

The decrease in tonnages in 1943 and 1944 as compared with 1938 and 1939 pointedly illustrates the shipping situation and combined with fairly constant values denotes the appreciable increase in prices. The low tonnage of imports in 1943 was accounted for in large measure by reduced receipts of coal, fuel oil and gasoline. It is further

TABLE 1

*Exports and Imports by Value and Volume, 1938, 1939, 1943 and 1944*

	Domestic £	Exports Re-exports £	Total £	Long Tons	Imports C.I.F. Value £	Long Tons
1938 .....	4,925,910	106,830	5,032,740	575,246	6,485,221	536,481
1939 .....	4,646,123	118,623	4,764,746	578,588	6,506,689	563,044
1943 .....	4,040,421	197,010	4,237,431	224,692	7,311,340	278,093
1944 .....	4,342,039	137,423	4,479,462	200,649	8,973,122	366,222

noteworthy that, whereas in 1938 ships arriving at Kingston numbered 1,403, during 1943 the number fell to only 362. At the same time there were increases in the imports of cotton piece-goods, dried and salted fish, flour, artificial silk piece-goods, boots and shoes, medicines and drugs, paper of all kinds, cement and hardware. Major export increases were recorded in sugar, coconuts, rum, citrus pulp, cigars, pimento and coconut oil, and large decreases in the value of exported bananas, coffee and orange oil.

Invisible items play an important part in Jamaica's balance of trade. Of these the most important are Imperial subsidies and remittances from labourers abroad; while in 1943, over half a million pounds worth of rum was sold to the United Kingdom and held in the Island for storage.

**Exports**

Table 2 shows the value of domestic exports to principal countries during the same two pre-war and two war years as in Table 1.

Before the war the United Kingdom was the principal market for Jamaican exports, taking in 1938 and 1939 59 and 63 per cent respectively of the total. Canada was an easy second, while in 1938 Germany was third, the United States fourth and Holland fifth. In 1939 the United States was third, Germany and Holland fourth and fifth, but exports to both of the latter had declined greatly.

During the war the European markets disappeared and shipments to the United Kingdom declined, while those to Canada and the United States increased substantially in value. In 1943 and 1944 Canada was the leading market, followed by the United States and the United Kingdom, exports to the latter having fallen by more than two-thirds. Shipments to these three countries, it will be noted, together accounted for over nine-tenths of total exports in 1944, those to Canada representing 48 per cent of the total.

Marked changes occurred during the war in the character as well as destina-

TABLE 2

*Exports by Principal Destinations in 1938, 1939, 1943 and 1944*

	1938 £	1939 £	1943 £	1944 £	Per Cent
Total .....	4,925,910	4,646,123	4,040,421	4,342,039	100
Empire countries .....	4,275,680	4,109,222	2,927,515	3,311,595	76.27
United Kingdom .....	2,913,853	2,925,474	714,862	917,455	21.13
Canada .....	1,309,213	1,095,580	1,959,757	2,088,158	48.09
Australia .....	7,725	7,915	5,201	13,310	0.31
Bahamas .....	11,416	13,645	36,572	73,900	1.70
Bermuda .....	7,235	4,734	5,788	4,451	0.10
Newfoundland .....	1,031	1,354	8,188	6,829	0.16
New Zealand .....	16,394	49,138	2,941	19,198	0.44
Others .....	8,813	11,382	194,206	188,224	4.33
Foreign countries .....	632,814	520,339	1,089,951	996,627	22.95
United States .....	180,327	260,209	845,820	915,873	21.09
Belgium .....	5,604	1,734	.....	.....	.....
France .....	54,318	15,182	.....	.....	.....
Germany .....	206,897	95,320	.....	.....	.....
Holland .....	137,691	89,653	.....	.....	.....
Panama .....	8,255	9,288	30,354	24,517	0.56
Others .....	39,722	48,953	213,777	56,237	1.30
Parcel post (all countries) ..	17,416	16,562	22,955	33,837	0.78



TABLE 3

*Exports by Principal Commodities in 1938, 1939, 1943 and 1944*

	1938	1939	1943	1944
Bananas .....	£2,916,956	£2,439,177	£ 47,278	£ 198,285
Sugar .....	859,500	989,563	1,831,614	1,859,035
Rum .....	247,892	247,047	462,371	605,101
Pimento .....	207,070	207,073	236,500	137,720
Coffee .....	32,907	146,047	113,081	196,503
Coconuts .....	84,155	74,998	177,907	145,592
Grapefruits .....	38,441	52,903	53	3,313
Oranges .....	96,952	113,989	34	7,534
Cocoa, raw .....	47,020	48,447	109,352	103,461
Ginger .....	50,939	40,571	124,535	159,179
Tobacco, cigars .....	17,028	16,734	120,673	155,738
Logwood .....	14,239	16,598	....	14,299
Logwood extract .....	50,677	78,155	96,369	18,662

tions of Jamaica's export trade. This is shown in Table 3, which gives the values of the principal commodities exported in 1938, 1939, 1943 and 1944.

In 1938 and 1939 bananas was the leading export commodity, accounting for well over one-half the value of total exports. In second place was sugar, followed by rum and pimento. Next in order in 1938, at much lesser values, were oranges, coconuts, ginger, raw cocoa, grapefruit, logwood extract, coffee, tobacco and logwood. The order of the latter was somewhat different in 1939, coffee having moved up to fifth place and being followed by oranges, logwood extract and coconuts.

In 1943 and 1944 sugar and rum were first and second with sharply increased values over the pre-war years. Bananas had sunk in 1943 to tenth place with only a fraction of its pre-war value, while pimento was third, followed by coconuts, ginger, and tobacco with substantially increased values, coffee, cocoa and logwood extract. In 1944 bananas had moved up to third place and coffee to fourth, being followed by tobacco, coconuts, pimento and cocoa. During these two years exports of citrus fruits were nearly negligible.

The United Kingdom was the leading pre-war market for Jamaica's bananas, with Canada second. Practically all sugar exports went to Canada and the United Kingdom, the greater quantity to the former. In the case of rum, the United Kingdom was first, followed by the United States, Germany and Canada. Pimento went chiefly to Germany, France, the United

States and the United Kingdom; oranges and grapefruit to the United Kingdom; coconuts to the United States and Canada; cocoa and coffee to Canada. In 1943 and 1944 sugar went mainly to Canada; rum, ginger, coconuts and pimento chiefly to the United States; cocoa to Canada.

### Imports

Tables 4 and 5 show imports into Jamaica in 1938, 1939, 1943 and 1944 by principal supplying countries and by principal commodities respectively.

Noteworthy features of the figures in Table 4 are the tripling of imports from Canada and the doubling of those from the United States in 1944 as compared with 1938 and 1939. Imports from the United Kingdom, it will be noted, were higher in value in 1943 than in 1938 or 1939, but declined about 50 per cent in 1944.

During the pre-war and war years compared in this report, the United Kingdom, Canada and the United States together supplied from 68 to 84 per cent of Jamaica's imports, the higher proportion being in the war years. The shares of each in the four years were as follows:—

*United Kingdom.*—1938, 33·5 per cent; 1939, 28·4; 1943, 35·1; 1944, 14·8 per cent.

*Canada.*—1938, 16·1 per cent; 1939, 17·2; 1943, 28·2; 1944, 38·2 per cent.

*United States.*—1938, 21 per cent; 1939, 22·6; 1943, 18·9; 1944, 31·6 per cent.

Main commodities imported from the United Kingdom in pre-war years were: cotton piece-goods, apparel, silk and wool manufactures, boots and shoes, hats, motor cars and parts, cement, chemicals, paints, fertilizers, medicines and drugs, agricultural machinery, agricultural and other im-

plements and tools, galvanized roofing, coal, salt, soap, flour, whisky, beer and ale. During the war shipments of cement, cotton piece-goods, fertilizers, agricultural tools, paints and salt were fairly well maintained, but those of the others mentioned decreased or ceased entirely.

TABLE 4

*Imports by Principal Countries in 1938, 1939, 1943 and 1944*

	1938	1939	1943	1944	Per Cent
	£	£	£	£	
Total .....	6,485,221	6,506,689	7,311,340	8,973,122	100.0
Empire countries .....	4,130,325	4,070,490	5,430,984	5,519,333	61.5
United Kingdom .....	2,108,639	1,847,731	2,566,302	1,324,471	14.8
Canada .....	1,014,276	1,121,108	2,062,204	3,429,457	38.2
Australia .....	119,559	112,471	96,600	.....	.....
Bahamas .....	10,252	14,851	77	1	.....
Bermuda .....	185,281	145,899	.....	.....	.....
Hong Kong .....	88,910	145,870	.....	.....	.....
India .....	54,669	74,123	274,239	178,646	1.9
Newfoundland .....	185,885	166,351	336,789	410,182	4.6
New Zealand .....	53,970	38,426	19	.....	.....
Trinidad .....	252,983	357,724	45,826	24,609	0.3
Others .....	55,910	45,936	48,928	151,967	1.7
Foreign countries .....	2,166,559	2,269,043	1,793,404	3,380,734	37.7
United States .....	1,359,143	1,471,285	1,383,169	2,834,159	31.6
Argentina .....	19,895	22,535	229	12,299	0.1
China .....	22,060	19,585	681	37	.....
Dutch West Indies .....	157,474	120,438	141,337	301,230	3.4
Panama .....	572	550	765	909	.....
Others .....	607,415	634,650	267,223	232,100	2.6
Parcel post .....	188,337	167,156	86,952	73,055	0.8

TABLE 5

*Imports by Principal Commodities in 1938, 1939, 1943 and 1944*

	1938	1939	1943	1944
	£	£	£	£
Class I—Food, Drink and Tobacco .....	1,758,793	1,758,451	1,992,705	3,383,600
Beer, ale, stout and porter .....	Gal. 83,913	80,714	9,969	14,104
Butter .....	Lb. 20,782	21,210	2,768	4,311
Butter substitutes .....	Lb. 956,579	707,619	602,637	182,579
Confectionery .....	Lb. 51,322	38,838	47,705	16,247
Fish—				
Alewives .....	Lb. 526,406	373,171	.....	.....
Canned .....	Lb. 10,087	6,947	.....	.....
Dried, salted .....	Lb. 920,843	1,007,800	32,772	46,658
Herrings, pickled .....	Lb. 29,528	31,913	2,765	3,960
Mackerels, pickled .....	Lb. 2,088,000	1,501,100	2,688,900	2,766,000
Grain—				
Corn .....	Lb. 12,320	8,983	51,118	57,811
Rice .....	Lb. 1,608,697	1,369,191	1,742,813	2,921,250
Flour, wheaten .....	Bags 34,879	34,322	64,590	108,082
Meal, all kinds .....	Bags 18,238,721	17,428,907	8,997,445	12,106,970
Meat—				
Canned .....	Lb. 212,180	202,884	342,257	495,823
Herrings, pickled .....	Lb. 381,450	685,216	730,100	2,328,200
Mackerels, pickled .....	Lb. 2,411	4,010	12,704	49,529
Others .....	Lb. 7,060,050	7,860,500	4,550,600	4,377,900
Parcel post .....	Lb. 50,848	59,355	100,088	87,561
Rice .....	Lb. 42,110,876	37,492,157	128,543	14,770,861
Flour, wheaten .....	Bags 195,198	165,975	1,928	305,661
Meal, all kinds .....	Bags 413,631	490,155	487,653	726,706
Others .....	Bags 451,957	439,134	661,826	1,368,898
Meat—				
Canned .....	Lb. 71,025	82,314	51	9,490
Others .....	Lb. 59,664	70,653	121	18,600
Others .....	Lb. 480,048	678,451	514,737	350,383
Parcel post .....	Lb. 15,261	20,638	39,008	25,503



Meat— <i>Con.</i>	1938	1939	1943	1944
Beef, wet salted .....Lb.	1,250,054	1,362,160	731,900	805,100
£	24,366	24,250	31,311	39,159
Ham .....Lb.	420,398	389,283	139,064	172,092
£	22,063	21,639	10,301	13,488
Pork, wet salted .....Lb.	814,618	867,554	1,077,650	1,930,400
£	17,725	18,101	34,709	68,184
Other kinds .....Lb.	395,181	585,402	40,807	75,930
£	15,505	22,449	1,955	3,753
Milk, condensed .....Lb.	9,899,759	10,159,829	4,486,121	3,225,756
£	143,891	151,708	126,267	176,751
Salt, fine and coarse .....Lb.	19,624,780	17,527,357	21,581,616	19,259,630
£	18,308	20,747	52,992	48,691
Spirits, potable .....Gal.	37,181	38,080	23,832	14,428
£	42,118	43,394	40,135	23,481
Tea .....Lb.	89,841	145,544	52,726	78,452
£	8,020	13,933	7,130	7,772
Tobacco—				
Leaf .....Lb.	771,568	686,305	583,680	1,078,502
£	48,465	55,521	66,854	130,401
Cigarettes .....Lb.	42,423	49,155	57,829	18,425
£	12,933	15,641	20,914	5,323
Wines, all kinds .....Gal.	18,137	14,721	1,223	1,335
£	14,027	10,510	1,146	1,249
Other articles .....£	244,294	255,639	259,063	312,162
Class II—Raw Materials and Articles				
Mainly Unmanufactured .....£	331,933	362,004	231,000	343,622
Coal .....Ton	142,997	153,415	30,677	36,842
£	160,211	172,712	125,177	130,629
Wood—Douglas fir, pitch pine, white pine .....Feet	16,063,138	16,233,928	2,388,424	6,733,950
£	150,187	160,502	70,981	172,093
Other articles .....£	21,535	28,790	34,842	40,900
Class III—Articles Wholly or Mainly Manufactured .....£	4,140,554	4,212,290	4,895,164	5,157,925
Asphalt, all kinds .....Lb.	10,647,661	17,095,040	12,422,783	2,963,272
£	24,382	42,444	68,625	19,554
Apparel (not specially enumerated) .....£	114,899	123,644	102,336	81,923
Boots, shoes, pumps and slippers...Doz. Pr.	133,793	178,529	47,943	82,902
£	201,942	256,111	293,895	484,435
Chinaware and earthenware .....£	21,960	19,584	24,878	55,202
Passenger motor cars .....No.	1,012	1,014	10	12
£	158,631	166,567	1,244	1,526
Motor-car parts, including tires and tubes £	89,612	98,721	16,677	50,521
Motor trucks .....No.	424	344	8	69
£	78,721	65,855	2,438	24,406
Cement .....Bbl.	177,971	170,848	155,357	300,243
£	88,200	84,765	114,691	121,329
Cotton piece-goods .....Yd.	25,846,680	26,784,004	19,189,290	13,788,832
£	387,790	401,947	987,187	757,809
Cotton, other manufactures .....£	69,260	81,240	183,959	136,452
Glass and glassware .....£	59,951	49,746	56,384	139,857
Haberdashery and millinery .....£	24,684	23,654	34,631	25,621
Hardware .....£	172,760	183,171	13,209	100,206
Hats of all kinds .....£	29,929	31,294	6,633	6,727
Machinery—				
Agricultural .....£	269,885	148,611	62,855	99,074
Railway and tramway .....£	25,461	6,527	14,233	*225,530
Fertilizers, chemical .....Ton	6,789	6,886	2,512	11,621
£	58,347	59,876	34,484	143,558
Medicines and drugs .....£	88,203	88,362	186,255	122,574
Metals—				
Iron, galvanized for roofing .....£	37,843	37,695	1,995	24,474
Steel bars and sheets .....£	36,933	25,060	22,584	58,763
Nails, screws, rivets and staples .....£	14,592	13,768	25,531	49,198
Musical instruments .....£	6,807	6,908	4,714	5,058
Oil, fuel .....Ton	159,081	170,242	16,782	46,386
£	224,323	277,363	43,915	114,992
Kerosene .....Gal.	2,075,824	1,718,411	1,136,588	1,866,783
£	43,795	33,819	18,128	29,077
Motor spirit .....Gal.	8,118,350	8,520,605	2,932,969	5,295,826
£	145,632	148,252	67,830	136,462
Painters colours and materials .....Lb.	1,924,398	1,991,455	1,731,605	1,428,708
£	42,680	45,382	52,231	56,968
Paper, all kinds .....£	131,324	144,063	334,473	233,016
Perfumery, cosmetics, etc. ....£	44,280	41,858	32,111	42,304
Broadstuffs, pure silk .....Yd.	62,421	30,053	.....	.....
£	2,164	1,879	.....	.....

*Imports by Principal Commodities in 1938, 1939, 1943 and 1944—Con.*

	1938	1939	1943	1944
Broadstuffs, artificial silk .....Yd.	4,101,590	4,926,960	3,819,057	1,483,423
£	111,722	132,334	331,199	155,629
Other manufactures .....£	27,456	38,200	2,084	3,763
Soap, laundry .....Lb.	4,552,329	4,811,082	.....	206
£	55,291	58,515	.....	5
Stationery other than of paper .....£	42,758	40,017	26,862	36,166
Wooden furniture .....£	19,634	14,056	13,332	6,385
Wooden hoops and shooks .....£	108,391	78,449	.....	253,299
Wool manufactures .....£	59,927	61,398	42,411	7,003
Other articles .....£	1,020,385	1,081,160	1,671,150	1,346,059
Class IV—Animals and Birds (not for food)£	3,250	2,286	2,936	9,306
Horned stock .....No.	6	30	30	91
£	485	861	1,664	7,266
Horses .....No.	14	17	5	.....
£	2,103	356	26	.....
Other articles .....£	662	1,069	1,246	2,040
Class V—Bullion and Specie and Parcel				
Post £	250,691	172,658	189,535	78,699
Bullion, gold and silver .....£	.....	.....	.....	1,707
Specie—				
Gold .....£	3,540	.....	.....	.....
Silver .....£	51,314	5,502	.....	3,907
Nickel .....£	7,500	.....	.....	.....
Parcel post .....£	188,337	167,156	86,952	73,055
Total, all classes .....£	6,485,221	6,507,689	7,311,340	8,973,122

\* Includes railway locomotives and rolling-stock.

From the United States principal pre-war imports were: cotton piece-goods, silk manufactures, motor cars and parts, chemicals, medicines and drugs, coal, gasoline and kerosene, electrical apparatus, hardware, agricultural and other tools, machinery, leaf tobacco, perfumery, printing paper, wooden shooks, flour, glass and glassware. Importations of some of these commodities, notably cotton piece-goods, glass and glassware, flour, medicines and drugs, and shooks, increased substantially during the war, while most of the others showed declines. There were, however, increased imports of a wide variety of other goods offsetting the declines and contributing to the increased value of total purchases from the United States.

In pre-war years there were a number of examples of important quantities of products purchased from various countries which subsequently disappeared or fell to insignificant proportions. As conditions become more normal and shipping is again available, these sources may again become active. Some of the outstanding instances may be briefly noted.

Cotton hosiery from Hong Kong in 1941 numbered 442,154 pairs valued at

£7,994, the greatest since 1934. Boots and shoes from the same source rose to a volume of 86,755 pairs in 1939 valued at £53,368. New Zealand butter reached an all-time high of £59,067 in 1941. German hardware and toys had dropped somewhat by 1939 but still accounted in value for £20,734 and £82,924 respectively. In 1939, Holland supplied condensed milk to a value of £134,357 and paper and paper manufactures to the extent of £13,033. Silk manufactures from Italy in the same year amounted to £14,778. Siam sent nearly five million pounds of rice valued at £23,999 during 1940. Sweden shipped paper manufactures in 1939 having a value of £5,217. Japan supplied during 1939 £17,014 worth of cotton manufactures, £15,008 worth of silk broadstuffs and £11,031 worth of wool manufactures. India's rice shipments, which were valued at £155,398 in 1937, fell completely away, while bags and sacks from India rose to 2,590,300 in 1943 and 2,145,960 in 1944 in number, valued at £194,605 and £170,636 respectively. Cuba in 1944 supplied 57,771 pairs of boots and shoes valued at £57,143 and cotton piece-goods valued at £66,594. In the previous year cotton piece-goods from Cuba were valued at £129,273.



Two other important items in Jamaica's import trade may be mentioned. Salt from Turks Islands increased from over 9 million pounds in 1939 to 11,966,680 pounds valued at £24,556 in 1944. Last, but far from least, Newfoundland's trade in "fish of

all kinds" (almost entirely codfish) during 1938 and 1939 reached a volume of 15 million pounds, and still amounted to 8,979,236 pounds in 1943 and 10,062,412 in 1944, valued at £336,237 and £410,182 respectively.

### TRADE WITH CANADA

Jamaica's total trade with Canada increased from £2,323,389 in 1938 to £5,517,615 in 1944. Exports to Canada in these two years were valued at £1,309,213 and £2,088,158 and imports from Canada at £1,014,276 and £3,429,457 respectively.

Table 6 shows the values of domestic exports to Canada by principal commodities in the four years 1938, 1939, 1943 and 1944. It will be noted that there were increases in the latter two over the former two in the value of

double that in 1938, but the volume increased only from 91,467 to 166,814 tons or about 82 per cent. Again, shipments of cocoa were slightly smaller in 1944 than in 1938 or 1939, although the value was more than double. In the case of rum, the quantity rose from 31,834 to 88,182 gallons as compared with an increase in value from £14,524 to £82,256.

Principal commodities imported from Canada are shown in Table 7. In 1938 and 1939, as this table shows, the lead-

TABLE 6

#### *Exports to Canada by Principal Commodities*

	1938 £	1939 £	1943 £	1944 £
Total .....	1,309,213	1,095,580	1,959,757	2,088,158
Cocoa, raw .....	42,945	48,168	109,350	103,387
Coffee, raw .....	123,213	137,649	35,307	.....
Bananas .....	320,855	252,999	36,776	.....
Oranges .....	11,075	9,471	34	.....
Coconuts .....	26,663	29,132	.....	.....
Grapefruits .....	2,272	1,998	.....	.....
Oils, edible, coconut .....	4	266	.....	.....
Oils, essential .....	665	859	709	1,362
Honey .....	.....	4	8,730	.....
Cattle hides .....	600	1,615	.....	.....
Limes .....	483	582	.....	.....
Ginger, dry .....	5,154	4,422	14,176	35,094
Pimento .....	4,675	5,261	9,931	11,497
Rum .....	14,524	10,536	39,323	82,256
Sugar, unrefined .....	750,282	588,085	1,670,408	1,628,716
Tobacco, cigars .....	1,006	944	110	1,240
All others .....	4,797	3,599	36,683	46,170

nearly all commodities, except bananas, coconuts and citrus fruits, shipments of which practically ceased. A large rise in the value of sugar exports, however, was mainly responsible for the increase in total value of exports to Canada.

While the quantities of some commodities exported to Canada were larger in 1943 and 1944, the higher values in these years than in 1938 and 1939, it should also be noted, were largely the result of higher prices. For example, the value of sugar shipped to Canada in 1944 was more than

ing items in value were boots and shoes, motor cars, parts for motor cars (including tires and tubes), dried salted fish, pickled mackerel, flour, cornmeal, hardware, printing and other paper, shooks and other lumber. With a few exceptions, notably motor cars and parts and cornmeal, imports of these and most of the other items listed in the table showed increased values in 1943 and 1944. Of particular note are the enlarged values of imports of fish, flour, meats, condensed milk, medicines and drugs, chemical fertilizers, paper, and cotton piece-goods.

TABLE 7

*Imports from Canada by Principal Commodities*

	1938	1939	1943	1944
Total .....	£1,014,267	£1,121,108	£2,062,204	£3,429,457
Boots and shoes .....	48,949	76,298	113,749	67,136
Butter .....	676	2,693	6,999	16,274
Cheese .....	17,036	17,298	22,041	14,454
Motor cars .....	81,004	82,628	939	90
Motor car and truck parts (including tires and tubes) .....	67,582	74,479	2,690	14,924
Motor trucks .....	42,629	36,010	2,438	22,566
Cotton piece-goods .....	206	290	47,626	18,968
Fish, dried salted .....	25,903	34,338	19,146	84,765
Alewives .....	12,275	8,947	45,701	57,811
Canned .....	11,546	16,505	50,346	103,928
Herrings, pickled .....	2,332	3,792	10,013	49,091
Mackerel, pickled .....	50,303	58,967	92,508	87,536
Flour .....	262,726	282,725	523,687	1,309,485
Cornmeal .....	37,916	33,561	40	.....
Wheat .....	3,667	3,287	7,036	11,965
Haberdashery and millinery .....	921	835	12,998	6,813
Hardware .....	16,791	18,102	13,578	9,526
Machinery, agricultural .....	1,428	2,855	1,002	4,262
Railway and tramway (equipment)...	646	1,873	.....	206,611
Nails, screws, rivets and staples.....	9,518	4,885	12,998	10,072
Fertilizers (chemical) .....	894	933	96	30,490
Meats: beef, wet salted .....	56	88	31,311	39,159
Ham .....	866	1,886	9,552	13,318
Pork, wet salted .....	7,228	6,793	32,974	68,184
Medicines and drugs .....	11,994	12,537	48,420	37,150
Milk, condensed .....	33,114	6,218	123,815	172,834
Provisions .....	5,077	10,461	52,848	33,500
Painters' and printers' colours and materials .....	6,100	8,876	10,930	28,249
Paper, printing and unenumerated ...	29,708	22,614	100,801	48,971
Tobacco, leaf .....	4,645	512	44,462	72,996
Potatoes .....	4,396	4,411	7,306	12,636
Shooks, Douglas fir, pitch pine and shingles .....	50,678	66,033	34,305	97,501
All other articles .....	116,423	159,194	502,219	662,113

**MISCELLANEOUS INFORMATION****COMMUNICATION SERVICES**

Air connection with Jamaica is maintained by the Pan-American Airways from Miami, Florida; one service direct to Kingston and on to Balboa, Panama, and the other stopping en route at Camaguey, Cuba, and thence to Baranquilla, Colombia, at which point there is a connection for Trinidad. K.L.M. (Dutch Airlines) also provides a connection from Miami and on to the Dutch West Indies. The British West Indies Airways operates a service between Jamaica and Trinidad via Trujillo, Santo Domingo, St. Kitts or Antigua and Barbados. This company hopes to extend its service from Jamaica to Belize, British Honduras, and from Jamaica to Nassau, Bahamas.

There is world-wide cable communication with Jamaica, but no long-

distance telephone beyond the island. Radio telephone communication is maintained with Canada, the United States and Mexico.

During the war all regular shipping connections with Jamaica were cancelled. Before the war there was a great number of shipping lines plying to and from Jamaica from North America, Europe and elsewhere, and these services will doubtless be resumed. The Canadian National Steamships re-established a freight service, with limited passenger accommodation, from Halifax in September, 1945.

**CUSTOMS TARIFF**

The customs tariff of Jamaica in very few instances imposes protection for local industry and is intended almost solely for revenue purposes.



Preferential treatment is accorded Empire countries and many goods are dutiable at the rate of 20 per cent ad valorem under the general tariff and 15 per cent ad valorem under the preferential tariff. Ad valorem rates are charged on the c.i.f. values, including wharfage.

The pending revision of the Canada-West Indies Trade Agreement has been held in abeyance until some time following the war. Meantime, by mutual consent, its terms remain in force. Under these, special preferences are extended to specific items of Canadian goods and not less than 25 per cent of the general tariff rate to others.

There is also a tonnage tax on articles imported into the island, charges being based on a sliding scale generally according to weight, while in the case of lumber, for example, the charge is 5s. per 1,000 board feet.

Interested firms may obtain detailed tariff and tonnage tax information upon application to the Department of Trade and Commerce, Ottawa.

#### IMPORT CONTROL

Import licences are required for the entry of all goods into Jamaica, licences being issued on the basis of essentiality. An importer must obtain an import licence before he can officially place an order and goods cannot be cleared through customs without the production of a valid import licence.

#### DOCUMENTATION

No unusual documentation is required covering shipments to Jamaica. A commercial invoice and certificate of value and origin in duplicate must accompany all shipments and care should be taken to complete these correctly, giving quantities, contents of each package and value of each item and the marks and numbers on the packages. As noted above, customs duties are collected on the c.i.f. values, so that transportation and any other charges should be clearly shown. If packages and packaging are included in the invoice cost, this should be

stated; otherwise a valuation will be set for customs purposes. A discount of 25 per cent is permitted on samples, provided they are declared as such and the value given. Documents should reach their destination well ahead of the shipment.

#### CURRENCY AND BANKS

English currency is legal tender in Jamaica and all business is done in sterling. Paper notes are issued by the Government in denominations of five and ten shillings, and one and five pounds.

Four commercial banks operate in the island: Barclays Bank (Dominion, Colonial and Overseas), the Canadian Bank of Commerce, the Bank of Nova Scotia and the Royal Bank of Canada.

#### WEIGHTS AND MEASURES

English weights and measures are the official standards.

#### PACKAGING

There are no particular packaging regulations, but especially sturdy containers are recommended because of the rough handling on the wharves.

#### TERMS

Usual terms are sight draft against documents presented through a bank, while first-class accounts are sometimes given terms with a discount for cash.

#### REPRESENTATION

Generally speaking, Canadian exporters to this territory obtain the best market results by appointing a resident commission agent and manufacturer's representative. It is always advisable for exporters to check with the Department of Trade and Commerce, Ottawa, or with their banker before negotiating with an unknown agent. In some cases, wholesale distributors and retail merchants desire direct import connections even on a sole purchase basis. With few exceptions this is not recommended. For advice and assistance, interested exporters should write

the Canadian Government Trade Commissioner, P.O. Box 225, Kingston, Jamaica.

#### BUSINESS VISITS

Canadians visiting Jamaica must have a valid passport and, if travelling by air, must obtain a transit visa from a United States consulate. There is no specified term of time a Canadian

may remain in the island, and the only formality on arrival is the usual customs clearance, which includes a declaration of the foreign exchange carried. An equivalent amount may be taken out on leaving. Inoculation and vaccination are not compulsory, although they are perhaps advisable for a person intending to remain any length of time.

### PROSPECTS FOR CANADIAN TRADE

Two basic requirements for the successful development of Canada's trade with the British West Indies are a direct steamship service designed for tropical requirements, and a steady exchange in which there is not a high premium on the Canadian dollar.

While there can be no question that Canada desires to retain her trade in the British West Indies markets and will make every effort to do so, it is difficult to estimate at the moment what results will be derived from such effort, even with the fulfilling of the two prerequisites mentioned, until Great Britain cancels the existing restrictions on imports from non-sterling areas and the question of whether or not British preferential tariffs are to be modified is finally settled.

Assuming that import restrictions are removed and the tariffs remain on much the same basis as pre-war, then there would be a possible market for a wide range of Canadian products.

#### FOODSTUFFS

Although the British West Indies are primarily agricultural colonies, it has been found that they are better adapted to the production of carbohydrate foods, such as sugar, rice and ground vegetables, than to foods of high protein content. Considerable progress has been made in the manufacturing of coconut oil products such as cooking oil and margarine, but butter fats are not likely to be available locally in any quantity, as local dairies are not able to begin to meet the demand for fresh milk.

To these production limitations must be added the very potent consideration that the people have become accustomed to living on imported foods and a very large section of the business in each colony has been organized around this demand. Consequently any change that might occur in the inhabitants' diet to allow for increased use of local foods would be by a slow process of modification, permitting exporters ample opportunity to make any necessary adjustments.

There is reason to believe, therefore, that the following food items, under normal conditions of trade, will be in demand for a long time to come:—

Flour, prepared breakfast cereals, oatmeal, cornmeal.

Animal and Poultry Feeds.—Oats, commercial mixed feeds, bran and pollards, linseed oilmeal.

Fish.—Dry salted cod, smoked herring and bloaters, pickled mackerel, canned salmon and canned sardines.

Dairy Products.—Condensed milk, butter, cheese, dried milk powder, evaporated milk, milk food beverages.

Meats.—Pickled pork, hams, fresh frozen meats, pickled beef, frozen poultry, cold storage eggs.

Vegetables.—Potatoes and onions.

Canned Goods.—Vegetables, fruits, soups.

Beer.

Dried split peas.

Condiments.

Confectionery.—Chocolate bars.

Fresh apples, during the Christmas season.

Groceries, miscellaneous.

#### MANUFACTURED GOODS

It is highly important for Canada to retain her market in the British



West Indies for foodstuffs, which have formed the backbone of Canadian exports to these colonies; but it is also important for the satisfactory development of Canadian trade that close attention be given to the markets for manufactured goods as well.

It has been pointed out that the total value of manufactured goods imported into the British West Indies colonies greatly exceeds that of foodstuffs. Inasmuch as Canadian firms only began to participate in the supply of such goods to any marked extent during the war years, they should offer scope for real trade development.

With agriculture and the processing of their products the predominant activity in the British West Indies, it is understandable that the principal demand is for consumer goods. Industrial requirements are limited to items necessary for maintenance of the sugar industry, the oil industry in Trinidad, the mining and sawmilling industries in British Guiana. In addition, of course, there is a demand for chemical fertilizers and equipment necessary for the production of the sugar cane, and also the usual demand for equipment needed to maintain urban and community electric power and water services.

The following notes cover merely the highlights of the manufactured goods markets. Further details may be obtained on application to the Department of Trade and Commerce, Ottawa.

*Iron and Steel Manufactures.*—Canada's trade in this classification has been confined mainly to metal furniture, wire nails, galvanized iron pipe, and modest quantities of structural steel, bolts and nuts, and wire netting.

There is a steady demand for iron pipe in the Trinidad oilfields, along with specialized steel equipment, but with the close control which is being exercised in the United Kingdom over oilfield supplies, it is questionable how far Canadian firms would be permitted to compete for such business.

The best prospects for Canadian business appear to be more in the general building trade, which should be

quite active during the next few years. This trade will be requiring galvanized iron roofing, nails, structural steel, galvanized iron pipe and sewer pipe. There should also be some demand for bolts and nuts and wire netting.

Steel office furniture has been a good trade for Canada in the past and should continue to be when local restrictions on imports are removed.

*Machinery.*—It is questionable how far Canada could compete in this trade. Most of the sugar machinery is imported from the United Kingdom and consequently replacement parts are from the same source. Oilfield equipment required in Trinidad is imported mainly from the United States.

There is no reason, however, why Canada should not participate actively in the market for sawmill machinery that exists in Trinidad and British Guiana. There is also the possibility of certain types of agricultural equipment being obtained from Canada, with the present tendency to mechanize the cultivation and harvesting of sugar cane and the increased use of mechanical equipment in the British Guiana rice fields.

*Vehicles.*—Canada and the United Kingdom supply most of the motor cars, trucks and vans used in the British West Indies. The Ford and Chevrolet are the two principal North American cars in use and provide a market for spare parts, accessories, tires and batteries.

There is occasionally a market for railway equipment in Trinidad and British Guiana, and for small gauge equipment on the sugar estates.

*Textiles.*—Cotton piece-goods are one of the main imports into the British West Indies. Canadian firms are competing successfully. Artificial silk piece-goods are also in demand but in smaller quantities. Canadian firms have been able to compete under wartime conditions and their products have been well received.

*Wearing Apparel.*—This is a market of first-class importance to Canadian exporters. Canada has developed an



excellent trade in leather footwear and it is expected that Canadian exporters will be able to hold the trade in women's footwear in which Canadian styles and prices were found attractive, even in pre-war days.

Canadian-made hats for men and women have been successfully introduced into the British West Indian markets and it is expected that Canada will retain a portion of this trade under peacetime conditions.

Cotton shirts and underwear were imported from Canada before the war and this trade should continue to develop as supplies become available. Canada also supplied the bulk of full-fashioned silk hose imported into these markets and, as war conditions are modified, this field should once more be open to Canadian shippers. Ready-made ladies' dresses have been securing an increasing sale in the British West Indies and merit the attention of Canadian exporters.

Rubber-soled canvas shoes is an established trade for Canada in these colonies. Pre-war competition was mainly from Asia.

*Glass and Clay Products.*—Cement is the main item in this classification which was supplied before the war under close commercial control from the United Kingdom and Canada. There is a strong, steady market, but competition is keen.

Glass bottles for rum are in demand. Household glassware was supplied pre-war, mainly from Germany, and window glass from the United Kingdom.

*Chemicals, Drugs and Colours.*—There is a large market for chemical fertilizers, especially sulphate of ammonia which is used on the sugar plantations.

Preparatory medicines have a large and steady market in all the colonies. A number of Canadian lines are well established. Competition is mainly from the United Kingdom and the United States.

Paints and varnishes are a staple line of merchandise in which a number

of the leading Canadian firms have shown active interest. Competition is mainly from the United Kingdom and, in view of the number of brands established on the market, it is difficult to secure effective representation for any new brands.

*Hardware and Cutlery.*—Builders' and cabinet hardware are in demand. Small tools have a ready sale. Cutlery and silver-plated ware have a moderate but steady sale under normal conditions.

*Electrical Goods and Apparatus.*—Bare and covered wire and cable, conduits, switchgear, meters, etc., have a steady market with competition from the United Kingdom and, in certain items, from the United States. Electrical refrigerators are always in demand and are supplied mainly from the United States.

Canada has been quite active in the supply of electrical appliances such as toasters, irons and hot-plates, and has been doing some business in electrical stoves and washing-machines, whose value is just beginning to be appreciated.

*Paper and Paper Products.*—Newsprint, printing paper, kraft wrapping paper, grocery bags, cardboard cartons, multi-wallpaper bags and toilet tissue are all salable in considerable volume.

*Lumber and Wood Products.*—When available, Douglas fir from British Columbia is a popular building wood in the British West Indies and is used in competition with pitch pine from the United States. Western red cedar was beginning to find a good market before the war and should again resume its progress once direct shipping becomes possible. White pine and spruce are imported from Eastern Canada.

Staves and shooks for the molasses trade find a steady market in Barbados. This Colony also provides a steady market for shingles. There is a fairly wide market for building board.







